

**Achievement of Market-Friendly Initiatives and Results Program
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**A STRATEGIC APPROACH TO DEVELOPING THE TOURISM ECONOMY OF
JORDAN**

2004 - 2010

Final Report

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The potential of the tourism economy of Jordan is to deliver annually and sustainably 10% of growing national GDP.

This can best be achieved through a strategic approach derived directly from a shared vision and empowered by a result driven partnership between the Public and Private Sectors. It must be led by Government and mandated and resourced to achieve clearly defined economic and social targets essential to Jordan's national interest in a planned way.

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INTRODUCTION

The strategy for developing the tourism economy of Jordan 2004-2010 has clear and challenging economic targets that can deliver a major boost to the national objectives of the Kingdom as well as social benefits to its people.

The future success of tourism in Jordan must be shaped by Jordanian leadership in the context of positive global market opportunities, super competitive forces and Jordan's specific response to the current negative regional geo political factors.

Successful and enduring strategy can only be woven from strands derived from a shared consensus on the opportunities and targets between the Private Sector Tourism industry and Government. **A successful strategy for the tourism sector will always require that both marketing and product strategies be considered and not marketing alone.**

Product development priorities must be set out within a market and customer led approach, which includes the agreement of society on the crucial importance of environmental protection, sustainability and cultural harmony.

The core foundation principle of the strategy is that tourism should deliver the optimum benefit to the economy, people and communities of Jordan, as its direct beneficiaries.

Tourism is the "oil" equivalent in Jordan's natural patrimony and there are very compelling reasons why tourism has to be a top priority sector to help drive the economic and social development of Jordan and these are set out.

Tourism success is best delivered through a partnership agreement that empowers result driven co-operative working between the Public and Private Sectors. Government and political leadership, must establish the economic and social priority of tourism as a sector that should be mandated and resourced to consistently deliver 10% of Jordan's growing GDP* in the period 2004 – 2010.

The Public and Private Sector interest is represented through the Jordan Tourist Board, the central body whose core task is to sustain and manage the Public/Private Sector Partnership, and to facilitate and support the Private Sector as the tourism driver that can produce sustainable growth, economic benefit and employment.

There are self-imposed as well as external barriers to the achievement of the targets and benefits. It will be essential to remove or diminish them to release the full potential of tourism as a bankable growth sector for the 21st Century economy of Jordan.

**Jordan's GDP in 2001 was JD 6,258.8(M) and tourism receipts were JD 496.1(M).*

WHY TOURISM IS A CRUCIAL SECTOR FOR JORDAN'S NATIONAL DEVELOPMENT.

- International tourism is a dawn industry of the 21st Century. As living standards and incomes rise, this growth will accelerate exponentially. The growth context for tourism is exceptionally positive despite current temporary setbacks.
- The cyclical nature of past tourism can be diminished and eliminated by planned responsive marketing that is dynamically managed. **In the economic mix of 21st Century, tourism can be more stable, enduring and sustainable than most sectors, and can react more quickly and decisively to changing market conditions and requirements.**
- Tourism can sustainably contribute a 10% slice of Jordan's GDP as the economy continues to expand.
- Tourism is a major earner of hard currencies and contributor to Government revenues and the national balance of payments.
- Tourism is an intensive employer and unlike industry, tourism jobs are not replaceable through capital investment. In fact the opposite occurs – the higher capital investment, the more jobs are created.
- Tourism requires a diversity of professional, technical, craft, skilled and operative staff.

Support to Regional Development, Communities and Rural Dwellers.

- Tourism is not concentrated in cities, but distributes its benefits widely. It is particularly valuable as a measure to support regional development, distribution of income and opportunity.
- Tourism combines well with traditional industries, such as agriculture and crafts.
- Tourism properly managed has a low import content. Most of its requirements can, through a planned approach, be met locally.
- Sustainable tourism development is not a threat to the environment, heritage or culture, but it can provide reasons to support investment in these areas, and therefore, improve them.
- Tourism brings considerable social benefits and its facilities are also available to local citizens and communities.
- Tourism is a necessary collateral, which supports industrial development, through foreign direct investment (FDI) in that it provides many of the lifestyle and leisure facilities top skilled people require.
- Tourism supports higher levels of air carrier scheduled access that is also essential for business and investment.

JORDAN'S OPPORTUNITY

Effective Government Leadership

The effectiveness of Government is determined primarily by its ability to allocate and support priorities within an integrated strategic framework of national interests. It is also necessary to give political leadership, so as to engage the commitment of partners and society behind the selected priorities.

Critical national strategic questions for Government must include:-

- What sectors can best be prioritised to develop growth in Jordan's GDP, so as to lead to improvement in living standards, and provide returns to Government to enable expenditure in areas critical to social development, such as security, education, health etc.
- What sectors can best be prioritised to create employment and distribute employment and income benefits to all parts and sectors of the Kingdom.
- If Government does not invest in growth areas that create revenues, income and wealth, so that as its first priority it earns income, then where will the income come from to fund vital expenditures?

Where Governments analyse these issues and critically examine the options for their achievement, **the tourism sector economy will receive a higher priority, because of its proven ability to deliver the highest economic and social returns on Government investment and to do so quickly.**

The opportunity for Jordan is to sustainably achieve 10% of its growing GDP from tourism and gain the real additional benefits that derive from it.

This will require increased Government and Private Sector investment that should be made in a planned way, and on the basis that the tourism sector will deliver on agreed targets that will repay the investments made.

THE STRATEGIC TOURISM CONTRACT

The Strategic Tourism Contract is a concept specially developed for the conditions existing in Jordan. Investors, including Government will need to know in advance, what the planned return on investment will be, and management and industry need tangible clear targets that they can plan for, respond to and be benchmarked against.

The Strategic Tourism Contract will integrate these requirements. The risk factor for investors, including Government will be in annual increments. The risk element will be the difference between current investment and required investment. The gain will be the difference between non-growth or low growth with the achieved growth against target.

A strategic contract for tourism will also eliminate the disruption occasioned by regular changes in political leadership by giving the sector the long term stable direction that it needs for success

Jordan cannot deploy the proposed strategy until certain current fundamentals are effectively dealt with and a growth pattern restored to the industry during 2003. A separate tactical bridge strategy – “Returning Jordan’s Tourism to Growth” is planned and approved by the industry but requires government agreement and support that will lead to implementation during 2003. This will clear the way for the adoption and deployment of the national tourism strategy that will extend from 2004 – 2010, but will be implemented through annual action plans..

The Strategic Tourism Contract will be an agreed compact, linked to the annual action plan, derived from the strategy and signed by the stakeholder partners binding each to both the investments and targets.

A template of the draft document format will be produced through the AMIR Programme.

DEFINING THE BENEFITS OF JORDAN

Planned investment in tourism under the proposed strategic agreement can produce the following key deliverables and benefits.

Visitor Expenditures (JD Millions)

To increase expenditures by out of state visitors in Jordan as follows:-

Note 1: Based on a return to growth in 2003 and 6% annual growth to 2010.

Year	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Gross										
Foreign Revenue	496.1	400	550	583	618	655	724.3	767.7	813.7	862.5

Government Revenues (JD Millions)

Note 2:

Year	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Taxation										

Tourism Balance of Payments (JD Millions)

Year	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Receipts	496.1									
Payments	297.8									
Balance	+198.3									

Employment (thousands)

To increase employment directly and indirectly created by tourism as follows:-

Note 3: Based on Deane/Henry 1MUS\$ = 50 jobs.

Year	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Jobs	34.7	28	38.5	40.8	43.2	47.9	50.7	53.7	56.9	60.3

Sustainability

The re-balancing and securement of Jordan's tourism markets as an effective counter to cyclical trends.

Year	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Arabic Markets										
Europe										
USA										
ASIA										
Rest of World										
Domestic										
Day Visitors										

Seasonality

To re-balance the seasonal flows of tourism, so as to effectively underpin the profitable operation of business and full time employment.

Year	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
High Season										
Early Shoulder										
Late Shoulder										
Off Season										

Entrepreneurial Development Targets

1. To maximise the benefits of tourism to local communities and to support traditional crafts, cultural and SME development.
2. To reduce leakages through the importation of goods and services used by tourism, by encouraging local production and SME development, e.g. food, drink, services, furniture etc.

These should be done through the development of operating and legal procedures, together with a “Linkage Programme”, designed to maximise benefits to Jordan’s economy, and to encourage entrepreneurial development.

As part of the proposed strategy it is necessary for government to put in place reliable measurement systems that are capable of tracking the targets that are set and reporting independently on them.

Vision for Tourism

To position tourism within the priorities of Government as an industry sector, that with planned investment and support can sustainably deliver on an annual basis over 10% of the Gross Domestic Product of Jordan, together with the associated employment, entrepreneurial opportunity, economic and social benefits for the people of the Kingdom.

Strategic Objective

The principal objective of Jordan’s strategy for tourism over the period 2004 – 2010, will be to build the tourism economy of Jordan to sustainably contribute 10% of Gross Domestic Product. The priority will be to increase international visitor expenditures, through planned marketing and product investment, as the key driver of the targets and deliverables set out in the partnership and agreed by the government and industry

Tourism Mission

To sustainably develop the tourism economy of Jordan through a result driven partnership of Government, tourist board and industry, investing and working together to achieve agreed and clearly defined targets and the associated economic and social benefits for the people of the Kingdom.

STRATEGIC PRINCIPLES

The tourism strategy for Jordan is based on the following principles:-

- The context for the marketing and development of Jordan's Tourism shall be a result driven partnership between Government, the Public Sector and the Private Sector, within policies and structures, which facilitate collaboration, co-operative working and investor confidence.
- Both Government and Private Sector will invest in tourism based on the defined returns both plan to achieve.
- Investment is the principal and dominant determinant of future tourism success. This includes capital investment, marketing investment, investment in quality, service delivery and human resources.
- In developing its tourism economy Jordan will plan to ensure that its tourism development is sustainable with:-
 - The preservation of its environmental excellence and eco principles.
 - The lifestyle and culture of its people and communities.
 - The fundamentals of profitable and socially responsible business operations.
- Market and customer requirements will drive the development and marketing of the industry within the principles of sustainability established by the strategy.

Social Equity

- Tourism should target the citizens and communities of Jordan as its primary beneficiaries by providing opportunity for income generation and employment, and by positively contributing to Government programmes, supporting quality of life, environmental excellence and the development of society.
- Tourism should be inclusive in its approach to involving people, culture and communities.
- Tourism policies should always consider social impacts and the erosional effects on underlying resources and should plan to minimise them.
- Tourism enterprises should invest in skill development and training to enhance human resource development.
- Tourism developments and facilities should always be open to local residents, as well as visitors.

PRODUCT DEVELOPMENT STRATEGY

The optimum strategy for the development of tourism to Jordan 2004 – 2010 will concentrate on the following:-

- Prioritising the development of those areas, products and services identified by the partnership as necessary to support the expansion of tourism, while ensuring a balance between supply and demand and regional development.
- Focus in the initial period on improving the visitor experience at existing key sites, through enhanced presentation and additional visitor services.
- Creating a position of excellence in heritage and natural product experiences, which will differentiate Jordan from its close competitors in these areas.

Create beacon/flagship attractions to lead the development of the position of excellence.

Because of their inherent strength in scale, image and content such attractions play a vital part in attracting and motivating tourism. Jordan is exceptional by having four iconic products that fit the highest level designation (The Dead Sea, The Holy Lands, Petra and Wadi Rum).

As Jordan has been gifted with such heritage riches, it is critically important that they are presented with exceptional care to heighten visitor experiences within the full multi-sensory range.

- Diversifying the product range through innovation to create new visitor experiences. As the core attractiveness of Jordan is centred on heritage and nature, it is a vital part of the strategy to deepen and enrich the experiences and broaden the scope where possible, such as health and wellness to avoid the perception of a tourism mono focus.
- Developing primary and secondary touring routes to support a greater future emphasis on FIT visitors.
- Developing a cluster strategy as a counter strategy to scale, so as to facilitate employment, SME opportunity and marketing.
- Improving product quality and service delivery.
- Expanding the range of accommodation options.
- Reducing the effects of seasonality by developing “long season” capabilities in products and areas.

The Quality Revolution

The accelerated development of tourism over the past two decades has re-categorised many previous tourism advantages as given current requirements.

The winning quest in tourism is for quality and innovation, which will exceed visitor expectations.

Quality does not derive from a big idea, but rather from the confluence of many small ideas and the perfection of services. Affluence has contributed to customisation, which is one of the most important trends in high yield tourism.

Product and service responsiveness to the customisation trend has led to advanced quality techniques that are dedicated to customer satisfaction and choice. They seek to meet individual needs precisely in all the fields of customer satisfaction, such as accommodation, food, leisure etc. For example, some advanced quality establishments are offering customers a “pillow menu”, with up to 10 choices, while others proceed on the basis that one type suits all.

Quality is the main contributor to value consideration as distinct from price.

Quality will become a significant differentiation and competitive element for tourism in the early 21st Century. It will be particularly important to these destinations like Jordan, who plan to target high yield markets and customers.

Investment

Investment is the dominant determinant of future tourism success. Attracting and sustaining investment is a priority strategic factor.

The current debt overhang from the rapid capital investment of the past few years create a critical issue that must be resolved, and is best resolved by a marketing investment that will return Jordan to growth.

The requirements for successful tourism investment.

- Good Government, providing accountable, transparent and stable governance.
- Economic soundness, with GDP showing annually improving trends.
- Continuity in fiscal policies.
- A competitive taxation environment.
- Effectiveness and continuity in corporate and contract law, with enforceable agreements and contracts.

- Access to land and property titles.
- Access to funds for capital investment at competitive interest rates, and over appropriate time scales, to meet the requirements of tourism.
- Free movement of capital and profits.
- Incentives to encourage and support investment priorities and areas.
- An effective, efficient Public Sector, free from corruption.
- Planning and licensing systems that are equitable and fair.
- Education, technical education and training for workers to serve the industry.
- A local population that is receptive to foreign visitors and supports tourism development.
- An effective international tourism marketing budget so that potential investors can see additional ROI and partnership in promotion

Environmental Care and Sustainability

Jordan's tourism products fundamentally depend on nature, the environment, heritage and culture. These are fragile and precious resources, and require strong perceptive policies to protect the underlying resources, while making them amenable to visitors.

The Rio Earth Summit (92) Agenda 21 and Johannesburg identified tourism as one of the very few sectors of economic activity, capable of providing an economic incentive for the preservation of the environment.

Jordan already enjoys some differentiation over competitors in terms of the scale of intrusive practices of trading and services adjacent to major attractions but they are present to an undesirable extent.

Before this area expands to nuisance levels, Jordan should consider how traditional traders and others can be accommodated, and continue to derive their livelihood from heritage and natural assets, but in a much less obtrusive and unsightly way.

Jordan strategy will be to adopt an eco tourism and sustainable approach. The major national and heritage attractions are permanent and any development should take a long-term view. Material choices, design and fit with the surroundings are vital issues.

Some existing developments close to major attractions do not currently reflect this policy, and should be scheduled for future replacement. Nature areas like Wadi Rum should be free from development in the reserve area.

The new visitor centre creates a gateway effect to the reserve area, which is good. It provides for the transition of the public to the attraction. It should be kept free of unsightly trading development.

Local tourism services such as desert guides or special interest/activity services should be centred at the visitor facility in terms of booking and pick up.

MARKETING STRATEGY

Marketing Strategy will evolve and change over the strategy period. The current state of development and marketing achievement require changes in primary strategies for immediate action.

Jordan's positioning will be as a boutique destination, which draws its lead products and brand themes from its patrimony of heritage and nature, in the context of a secure, peaceful destination, and a friendly welcoming people.

- Jordan's approach to the international long haul markets will be a niche marketing strategy, directed to well defined target markets and segments, using specialist networks of tour operators, media and web marketing.
- Jordan's approach to the regional markets (GCC+) will be focused and will concentrate of FIT visitors, special interest and family groups, which it will motivate by the most direct methods available.
- Jordan must correct, as quickly as possible, the current research deficit, so that it can effectively support these strategies with the level of information required for professional, targeted marketing campaigns.
- The marketing platform to be used by Jordan will be a Public/Private Partnership, led by the Minister, managed by the JTB? and dedicated to supporting and facilitating the Private Sector as the engine of growth.
- To strengthen its position in reaching global markets Jordan will prioritise the development of a cutting edge distributed web site to provide customer and trade information, to support its niche marketing strategy, and to bridge access to product/package sellers.
- Correcting the under funding, funding uncertainty and under staffing of JTB, and improving its capacity as an international marketing support body will be a priority for investment.

PACKAGING STRATEGY

To offer packages as holiday solutions to selected target markets and segments within the context of lifestyle, customisation and choice.

DISTRIBUTION STRATEGY

A twin strategic approach will differentiate between long haul and regional markets.

Long Haul Market Distribution

To offer Jordan's products to long haul markets through:-

- (a) A network of tour operators and specialist agents.
- (b) Support for direct product producers selling through specialist media or distribution systems.
- (c) The development of web marketing capability, which will include direct trade sellers.

Long Haul Market Support

JTB will support the distribution system through:-

- (a) Market based representative promotional activity
- (b) Facilitating Trade-to-Trade selling activity.
- (c) Media Publicity*
- (d) Media and trade familiarisation and education in Jordan*
- (e) Destination Advertising in selected media*
- (f) Marketing/Promotional materials*

*JTB – Industry Partnership including RJ.

Regional Markets

To offer Jordan's products to regional markets through:-

- (a) Direct Consumer Advertising.
- (b) Consumer Promotions – “Discover Jordan”.
- (c) Web Marketing.
- (d) Advertising in Specialist Media.
- (e) Direct Activity to MICE and group sectors.

HUMAN RESOURCE STRATEGY

All high performance comes from the human resource. To ensure a pool of skills suitable to the needs of the industry, tourism must link to the educational systems, as well as having an industry specific capacity and international connectivity through Ammon College.

Management capacity, technical skills, craft skills and service delivery training are all important supports that underpin Jordan's strategy as a boutique destination, with products and services targeted to appeal to high yield visitors.

Jordan's strategy for human resource development for tourism will have five principal elements:-

- For management, professional and technical skills, including marketing and language, Jordan will look to its third level and technical colleges. Tourism will influence the curricula in particular areas, and the industry will provide co-ordinated work experience, where this is appropriate.
- For craft and service delivery training, Jordan will look to Ammon College as a permanent hub facility, where the industry has direct policy and curriculum influence. International linkages are also important.
- For the future there will be more emphasis on "train the trainer" and "in house" "on the job" training, as a means of enhancing the pervasiveness of training throughout the industry.
- Jordan would benefit from placement training in five areas:-

International Marketing
Product Marketing
Marketing planning
Heritage Presentation.
Site Preservation

Under such a scheme key lead staff would be positioned in a capacity building context, with organisations of recognised excellence in other countries.

- The retention of high quality staff has become an issue for tourism throughout the world. The counter to this is for employers to ensure that staff have the prospect of career paths and enjoy similar benefits to comparable employment in industry.

INSTITUTIONAL FRAMEWORK STRATEGY

Tourism is primarily the domain of the Private Sector, but **it cannot succeed without the leadership and support of Government and the Public Sector.** Even in the most developed economies with strong private sectors public funds are still required and are justified for the support of tourism development.

It is an important context for tourism that the national tourism authority can work within an empowering institutional framework.

Tourism, Antiquities and Crafts

Jordan's policy of combining tourism and antiquities, and now crafts in a single Ministry is widely admired internationally.

In other countries divergence between these groups can create major access and operational difficulties for tourism industries with a heavy reliance on heritage. Jordan's Ministerial structuring ensures the convergence of these key policies essential to tourism. It also provides a supporting structure format, which has enhanced importance as the JTB has a pure marketing mandate, and must rely on others to produce and manage the product development side of tourism.

Jordan Tourist Board (NTA)

International Best Practice is for independent NTA's with commercially sized boards (maximum 10), with substantial Private Sector majorities of senior skilled and business experienced Directors, with marketing and industry experience.

Jordan has gone most of the way to meet this model. The Minister is the Chairman of JTB. Because of the requirement for the Minister to take a holistic approach, and his direct link to Government, this can have a positive value as long as the ability of the Board to reach independent decisions, and make commercial, rather than political decisions, is not compromised (there is no evidence that it is).

Institutional Fragmentation

The essence of tourism is that visitors who live outside the Kingdom of Jordan are promoted to come to Jordan to consume products in Jordan. It is known as "export tourism", because it is similar to "exports", except that in the case of tourism the customer comes to the product.

Selling and promoting Jordan's products abroad requires a networked and integrated approach, with reach into international markets.

The arguments for disaggregating this responsibility and establishing sectoral networks, weakens the national effort, and can cause wasteful overlap and duplication of effort, diminishing the effectiveness of resources that are always limited.

Priority Weakness 4 argues for the prevention of this fragmentation by an inclusive approach that should include medical, wellness, education, MICE and others.

Their inclusion can strengthen the effectiveness of the JTB, and their functional budgets will create greater synergy when combined and focused in international markets through the JTB.

Arguments for excluding them on technical knowledge grounds are not valid, as tourist boards are always made up of teams of people with diverse technical skills, and conversely technically qualified people may lack marketing and sales skills, which are the strength of NTA's.

The strategy proposed is that the JTB should develop a strong product marketing capability, and that this should be inclusive of all products Jordan puts in the market place to attract consumer/visitors to Jordan within the definition of tourism.

CRITICAL SUCCESS FACTORS

- Improved priority and increased planned funding for the development of the tourism economy, and for destination and product marketing to deliver the targets agreed in the strategic tourism contract.
- Partnership working between the Public and Private Sectors in agreeing objectives, planning their achievement and undertaking the necessary actions and operations, through pooling of resources and skills.
- Improved international air access within a competitive “open skies” policy.
- Structuring tourism for inclusive participation from national to community levels.
- Creating a safe environment, free from crime and nuisance.
- Quality enhancement of the visitor experience, through presentation, customisation and service delivery.
- Product design, diversity, presentation and innovation to build more satisfying visitor experiences.
- Market Research to empower target and segmented marketing.
- Improving “the welcome” to Jordan at all appropriate entry points.
- Adopting and implementing sustainable tourism policies.
- Enabling, supporting and facilitating investment.
- Obtaining greater involvement and support from all of the beneficiaries of the tourism economy.
- Provision of training and capacity building measures to improve the human resources contribution and capability.
- Creating awareness, understanding and support for tourism by the community of Jordan.

THE GLOBAL TOURISM MARKETPLACE

There is no country or region of our global world that is **not** actively seeking tourism in the 21st Century. Competition for economic gain from the world's largest growth sector is intense. Egypt, as a close regional competitor had plans and proposals to double the capacity of its tourism industry prior to September 11th 2001.

Modern tourism's rapid growth is entirely a product of the second half of the 20th Century.

It is a sector that will see exponential growth in the 21st Century, but the benefits of this growth will be unevenly spread, with a clear priority in favour of those nations who as "early movers" adopt a strategic approach, with well-developed policy instruments and resources to support the achievement of their objectives and targets.

Jordan's Principal Weaknesses

At this time Jordan has an excess of product, which is beyond the resources and capabilities of its current marketing achievement to sustain.

The debt overhang from recent capital investment is a critical threat to continuing and further investment, which is the principal determinant of future success. This vicious circle of potentially deepening criticality can and should be reversed to a virtuous circle by the end of 2003, through immediate marketing investment to grow the demand side. A separate Tactical Bridge Strategy Plan for 2003 has been endorsed by the industry to deal with this issue.

Priority Weakness 1 – The Customer "Fear Factor"

The market place perception that Jordan may be an "unsafe" destination is the principal and dominant barrier to immediate growth.

A return to growth strategy will as a fundamental, require an integrated series of measures and actions to diminish this barrier issue. The most effective way to counteract this is to quadruple the visits to Jordan by opinion forming media and tour operators. The JTB have already proved this is possible with the planned visits during 2003 of

Priority Weakness 2 – Under resourcing of tourism and particularly international marketing.

The current level of expenditure on tourism does not enable a full professional address by the JTB and the industry to the competitive global marketplace or to equip with the skills and capacity necessary to manage an industry sector that can deliver 10% of Jordan's GDP.

Without policy priority and correction from government, future growth prospects will continue to be below the potential.

Priority Weakness 3 – Weak Partnership Working

Optimum performance requires a new planned approach to partnership working that will capture and focus the resources and energies of the Public and Private Sector in a synergetic way. All professionals agree this but the practical expression of partnership working to the level required for world-class success is not present.

The Private Sector should be prioritised and agreed as the engine of growth to be facilitated, assisted and supported by the JTB and Public Sector. Despite weaknesses that may be present the private sector is the only sustainable engine of growth and where this is not understood or accepted, stronger intervention by government in inappropriate areas of the economy can prolong this weakness increasing the difficulty that has to be faced and solved eventually.

There is also a need for Public – Public partnership working. The normal disaggregation of authority by government through its ministries has a slowing effect on change and development unless there are clearly defined national priorities driven by cabinet decision-making. The new economic order of the 21st century is much less tolerant of this public sector inefficiency and as a result it can present a deal breaking barrier to foreign direct investment and other benefits. Effective governments have created “one stop shop” concepts as an alternative to sending investors/entrepreneurs on extended shopping marathons to comply with defused public sector requirements. As an example the JTB acknowledged that to get a new sign in position at Amman airport it had to obtain clearance from over 15 different “authorities”.

Priority Weakness 4 – Fragmented Approach

Mission and institutional fragmentation produces weakness, as it **cannot** consolidate brand strength and integrated benefits. In justifying its own mandate it replicates existing structures and dilutes resources and effectiveness. Internal sub-national competition is destructive of, and inconsistent with the effectiveness of a national and integrated approach. The marketing of health, educational and other specialised forms of tourism are relevant parts of the tourism mission – their diffusion weakens the resources and synergies that would otherwise be available to tourism.

Priority Weakness 5 – Low Visitor Value

There are many issues that contribute to a lowering of visitor value.

- Short length of stay
- Low visitor expenditure
- Unco-ordinated visitor servicing post arrival in Jordan.
- Lack of tourism ground organisation.
- Lack of product diversity.
- Site presentation that induces shorter visits through organisation that does not respond to the needs of visitors.

Maximising the value of visitors attracted is the most “controllable” aspect of the tourism action plan arising from the growth strategy. An immediate programme of product development and marketing designed to lengthen stay is required.

Priority Weakness 6 – Access, Entry and Distribution

Scheduled air access is the critical element for the development of high yield tourism from key growth markets in Europe, USA and ASIA.

While Aqaba is planned as a regional airport with large aircraft capability, Amman is the current gateway to Jordan and is served by 27 international carriers. It can enhance its market share further by promoting itself as a secure entry of choice for pilgrims and visitors to the Holy Land.

Entry procedures, which include visa, immigration and customs, must present a welcome to visitors, while working efficiently.

Distribution of visitors throughout Jordan via the development of touring routes needs to be strengthened, so as to link centres and products by the most interesting (rather than the shortest) routes and to contribute to length of stay. Touring routes once identified should be reinforced through the product development strategy.

Priority Weakness 7 – Scale and Deployment of Marketing Resources

The effective deployment of marketing resources against targets requires high levels of market knowledge and assessment skills. This is best done in the context of good market research, market intelligence, and the use of techniques, such as attainability analysis.

In managing to ensure the successful achievement of targets, the deployment of resources becomes critical, so as to gain the highest level of return on every investment. The strategy and targets agreed fix the principal measurement element as revenue (visitor expenditures), but there are other considerations:-

- Seasonal spread
- Regional distribution of revenue
- Market sustainability and balance
- Length of stay
- Use of high yield products
- Employment creation
- Negative impacts
- Ease of access

Jordan must develop a resource allocation model, that will meet its very specific requirements on an ongoing basis, and to underpin strategic confidence in the increased levels of marketing investment that are necessary.

Jordan's Core Strength

While Jordan can competitively bring many products to the market place **one comparative advantage stands dominant overall – the iconic nature of its major heritage and natural landscape products that have already established strong images and potential motivators with key segments.**

The heart and roots of the Jordanian nation are in its natural landscapes.

They have shaped its history, culture and identity as a people. They are dominant, stable and enduring in a changing world. They demonstrate the evidence of human harmony with nature. They define the sense of place and common interest of the Jordanian people and they hold a patrimony of history that is important to the world's major religions.

They also provide the potentially winning backdrop and interface for many successful tourism themes.

This incredibly strong unique selling proposition can be linked directly to key growth market segments and “pull factors”, which can build motivational “high retention” images (retained good images) essential to successful marketing.

These are:-

- The Dead Sea
- The Holy Land – Religious Clusters: Biblical, Christian, Muslim.
- Petra
- Wadi Rum

Iconic heritage and landscapes have a unique role as keystone building blocks of quality visitor experiences and powerful motivators for tourism marketing success.

THE FRAMEWORK FOR DEVELOPMENT

The strategic approach works best where it links to a framework for development, which recognises the dynamics of tourism and its regional distribution. This framework is the receptor for investment, product development, touring and marketing. It links directly to Government policies for supporting tourism through incentives, for distributing income and social equity and developing human resources.

The recommended framework for Jordan should have the following distinctive elements.

- **Tourism Centres**
- **Developing Tourism Areas**
- **Special Interest Tourism Areas**
- **Touring Routes – Primary and Secondary**

Tourism Centres (3)

The selected Tourism Centres are characterised by having a substantial cluster of accommodation, together with the ability to meet the other 5 essentials for tourism within the centre and its immediate hinterland zone.

Amman City

The capital of Jordan, and the principal entry point for international airborne visitors, Amman combines its history as one of the oldest continuously inhabited cities in the world, with modern progressiveness.

Aqaba Special Economic Zone

The historic city, port and sea access entry point to Jordan. Now a special economic development zone, which will boost its strength as a centre for business and tourism. Aqaba, because of the new forces created by the Commission, will be in a position to create an individual detailed strategy, and to deploy development and marketing resources to achieve its objectives. It must be part of the partnership for tourism.

The Petra – Wadi Mousa Cluster

The world-renowned heritage icon of Petra is sufficiently strong to anchor an accommodation cluster and merit centre status.

Developing Tourism Areas (1)

Developing tourism areas are distinguished from tourism centres, mainly by their scale, in terms of the accommodation base. They will inevitably contain vitally important assets for tourism (both developed and undeveloped). They will be attractive for investment, and will be on the agreed tourism route network. They have the capability for accelerated development.

The Dead Sea Zone

The area of the Dead Sea anchors three important special interest product themes.

- Health and Wellness
- The Holy Land Religious Clusters
- Mujib Wildlife Reserve (Eco Tourism)

Special Interest Tourism Areas

Wadi Rum

A desert environment of dramatic landscapes, which is the heart of Jordan, and central to its Bedouin history and tradition, made famous to outsiders through the writings of TE Lawrence.

Salt – Old City

Once the capital of Jordan, a well preserved heritage town (30 – 40 minutes from Amman).

Dana Valley – Dana Wildlife Reserve

A world of natural treasures, containing a diversity of valley, highland and desert landscapes.

Ajlun and Jerash (Heritage – Nature Tourism)

While close to Amman, this area has the potential for accommodation development, in addition to its day trip role from the Amman Centre. The Castle at Ajlun, while very dominant in its location lacks interpretation, animation and presentation. The Cardo at Jerash has the potential to be one of the great historic walk products.

Azraq (unique wetland reserve)

A unique seasonally flooded wetland in the Eastern Desert, which supports a diversity of birds, as a hub on the migration route linking Africa and Asia.

Madaba and Mount Nebo (Religious, Pilgrimage, Heritage, Art and Touring).

Madaba – “the City of Mosaics” is establishing a worldwide reputation for its Byzantine mosaic art, while Mount Nebo is one of the most revered biblical sites.

Umm Al Rassas, which is under excavation, has revealed some stunning examples of the mosaic art.

Um Qeis, Pella (Tabaqat Fahil) and Jordan Valley (Biblical, Greco-Roman, touring views).

A rich area of archaeology and history, with stunning views and sightseeing.

Azraq – The Desert Castles – Qusair Amra Unesco World Heritage Site

A touring area, which touches Crusader, Military and Regional history.

Touring Routes

The primary touring routes should be designed to facilitate the principal distribution of coach and car borne visitors. The future priority will be to facilitate self-driven FIT visitors.

The secondary touring routes encourage visits to smaller communities, special interest and discovery areas off these routes or from centres.

The development strategy for touring routes will involve a programme of route facilitation and route re-enforcement. This will involve: -

Facilitation

Signposting
Maps
Tourist Information Points
Tourist Services
Viewing Points

Re-enforcement

Route Development Plans
Priority for on route projects
Presentation enhancement of projects and sites
Incentives for development.

THE SIX PILLARS OF TOURISM

(The six essentials for international tourism development).

Today's tourists are sophisticated, well travelled visitors, with wide experience of other countries. They select their holiday choices carefully and have high expectations from the investment they make them. Many areas that were in the past seen as "advantages, are now **given** requirements for tourism. The visitor experience, which has now become the central issue for successful tourism rests on six elements – the six essentials.

Accommodation

The requirement is for a mix of quality accommodations to cater for differences in visitor budgets and tastes. It must, as a minimum, meet the criteria for internationally recognised classifications and preferably exceed them.

Registration, grading and classification systems and brands are now a norm for customer assurance. National systems, or systems not linked to internationally accepted quality criteria confuse the customer and damage repeat business, word of mouth, publicity and recommendation.

Food

Food is a vital part of the holiday experience. Regional cuisines and local food dishes can play an enhanced role in creating satisfying experiences. This is a flexible area for imagination, engagement and style. The overall role of fresh, quality produce, simply cooked and well presented remains a global fundamental.

Activities, Facilities and Special Interest

This essential embraces a diverse area of "things to see and do" during the active visitors day. They also range from passive recreation, leisure, heritage interpretation, to active experiences and pursuit of special interest or adventure. It also includes facilities for the MICE segment.

This essential area significantly impacts on length of stay and repeat business.

Night Activities

Late dining (dinner) by itself is insufficient to fill that period from circa 18.00 to midnight, when holidaymakers are still active.

Entertainment products frequently draw on local culture and music, but the area and options are limitless, when imagination and skills are combined.

Transport

Access transport is clearly a key essential, but the area also includes internal transport between centres, self drive car hire, bicycle hire, boats and more unusual transport options by horse, camel, or walking trails.

Visitor Services

This varied area is extensive. It can begin with networked information services, tourist offices or tourist information points.

It very importantly includes guides, signposting, maps, and literature. It includes all those services required to support Jordan's portfolio of special interest tourism, such as scuba diving, rock climbing and trekking.

The provision of these six pillars provides the foundation for international tourism. Weaknesses in any of these pillars, as they apply to centres diminish success and they must be corrected in a planned way.

Local communities can use this six pillar template as a self-assessment tool.

It is not possible for normal international tourism to thrive without this combination. There are simply no alternative assessment measures.